S-Drive Quick Start Guide v1.24

1. Installation

Go to "S-Drive Product Page" (https://sdriveapp.com). And click "Get S-Drive" button. Answer the questions, confirm the installation and click on "Install" button. After submitting your Salesforce.com password click Continue/Next until the UI asks you to choose security level. Click on "Grant access to all users" and click "Next" and click "Install". For detailed instructions refer to "*S-Drive Installation Guide*" (page 2).

Important Note: Upgrading to S-Drive 1.24 is not possible. Please wait S-Drive 1.25 for the upgrades.

2. Displaying S-Drive Tab in Sales App

Go to "Setup" -> "Personal Setup" -> "My Personal Information" -> "Change My Display". Click "Customize My Tabs" button. If you don't find the link, try "My Settings"->"Display&Layout"->"Customize My Tabs". Select "Sales" from the "Custom App" drop down box. Move "**S-Drive**" from "Available Tabs" box to "Selected Tabs". Click "Save".

3. Activating S-Drive

Click on "S-Drive" tab. If Remote Site Settings are configured correctly, you need to complete "Step 2: Configure Amazon S3 Credentials", "Step 3: Configure Amazon S3 Bucket Name" and "Step 4: S-Drive Authorization" sections.

- For Step 2, you must have Amazon S3 Access Key and Secret Key information to use with S-Drive.
- For Step 4, you need to create a free S-Drive account and authorize S-Drive to connect your organization at *https://portal.sdriveapp.com*

For detailed instructions refer to "*S-Drive Installation Guide*".

4. Configuring Out of the Box S-Drive Attachments

S-Drive comes with preconfigured Account, Case, Contact, Opportunity attachments as overridden. If you want to use S-Drive Attachments on these objects, you can easily enable by following these steps:

- After installing and activating S-Drive, go to "Setup" -> "App Setup" -> "Customize" -> "Accounts" (or Cases, Contacts, Opportunities) -> "Button and Links"
- Click "Edit" next to the "View" label.
- Select "Override With" as "Visualforce Page" and select the correct bundled page (AccountFilePage for Accounts, CaseFilePage for Cases, ContactFilePage for

Contacts, OpportunityFilePage for Opportunities) from the dropdown and click Save.
- You should see the Account (or Case, Contact, Opportunity) Files section in your individual object pages' bottom section.

5. Configuring Standard/Custom Object Attachment Upload Feature

S-Drive stores all file information as Salesforce.com records on objects that represent each file on Amazon storage. In order to store file information, you can either use the S-Drive provided file objects for the Case, Contact, Account and Opportunity objects (see above item) or you can create your own.

Creating Custom Object Files

- Go to "Setup" -> "App Setup" -> "Create" -> "Objects". And click "New Custom Object" button. Fill in the required fields to create a new custom object (for example, named as "My Example Object File"). For "Record Name" field, type "My Example Object File Number". Select "Auto Number" as "Data Type". Type in "A-{0000}" for "Display Format" and "1" for" Starting Number"
- Check if the "Deployment Status" is set to "Deployed". Then click "Save" button to create the custom object file
- After creating custom object, create fields for that object. So, to create fields to "My Example Object File" object, click on "Custom fields & Relationships" and create the following fields: (while creating, make sure that all fields are visible to all users):

o	Content Type	Type = Text Length = 255
o	Description	Type = Text Area(Long) Length = 32,000 Visible Lines = 3
o	File Name	Type = Text Length = 255
o	File Size in Bytes	Type = Number Length = 18
o	Parent	Type=Master-Detail Relationship Related to = My Example Object
o	Parent Folder Id	Type = Text Length = 255
o	File Size	Type = Formula Formula Return Type = Text

Copy and paste below code to "Simple Formula" field:

```
IF(File_Size_in_Bytes__c > 1024,
IF(File_Size_in_Bytes__c > 1048576,
IF(File_Size_in_Bytes__c > 1073741824,
TEXT(ROUND((File_Size_in_Bytes__c /1073741824),2)) & " GB",
TEXT(ROUND((File_Size_in_Bytes__c /1048576),2)) & " MB"),
TEXT(ROUND((File_Size_in_Bytes__c /1024),2)) & " KB"),
TEXT(File_Size_in_Bytes__c) & " bytes")
```

Click "Check Syntax" button to see if you have correctly typed the formula.

- o WIP   Type = Checkbox
        Default Value = Checked
- o Private *(This field is optional)*
        Type = Checkbox
        Default Value = Unchecked

For more information, about usage/setting of this property see "S-Drive Advanced Configuration Guide" (page 25).

Creating Before Delete Trigger for Custom Object *(Optional)*

You can find detailed information about creating "before delete trigger" in "*S-Drive Advanced Configuration Guide*" (page 17).

Creating Custom Object Files Page

In this step we'll create custom object file's Visualforce page. This page can be used to override the object's view or it also can be used as an inline section for the object's layout. At the end of this section, use cases for both scenarios will be displayed. To create an object file page, follow these steps:

- Go to "Setup" -> "App Setup" -> "Develop"-> "Pages" and click the "New" button at the top of the page. Create a page (For example "MyExample" page). And type following code inside the page (Note that this sample is for *override* option with chatter enabled and inline is set to "true" for this reason. For *inline* option you need to remove "*apex:detail*" tag):

```
<apex:page standardController="My_Example_Object__c"
        tabStyle="My_Example_Object__c">
  <apex:detail inlineEdit="true"
            relatedList="true"
            showChatter="true"/>
  <cg:AttachmentComponent title="My Example Object Files"
        inline="true"
        customObjectName="My_Example_Object__c"
        customObjectFileName="My_Example_Object_File__c"
        objectId="{!My_Example_Object__c.Id}" />
</apex:page>
```

Remember that this is just an example. You need to set these component attributes based on your configuration. For more information about component attributes refer to "*S-Drive Advanced Configuration Guide*" (page 20)

- Now set the security for your page on other profiles. Go to "Setup" -> "App Setup" -> "Develop" -> "Pages" and click "Security" link next to your page name. Move all profiles (or select based on your needs) from "Available Profiles" to "Enabled Profiles". Now we have an object (or created our custom object), created our custom object file and custom object file page. At this point, we can override the custom object's view or we can use "S-Drive Attachments" as an inline section in the page layout:

- o Overriding the View of the Object

  Go to "Setup" -> "App Setup" -> "Create"-> "Object" and click the label of your custom object. You'll see "Object Definition Detail" screen. Scroll down and find "Standard Buttons and Links" page block and click "Edit" action next

to the "View" label. Then select Visualforce Page for *Override With* section and pick "MyExampleFilePage" (the custom page you created previously for this object) from the drop-down box. Click "Save" button to complete the override. After creating a test object you should see "My Example Object Files" page block at the end of the object detail page. See "*S-Drive User Guide*" for more information on how to use the buttons and functions in this page block.

- o Using as Inline Attachment

  To use S-Drive Attachments as inline, we need to set "inline" property to "true". That is, in the example page we have created above, *inline = "true"* must be included to use S-Drive Attachments as inline.
  Go to "Setup" -> "App Setup" -> "Create"-> "Object" and click the label of your custom object. You'll see "Object Definition Detail" screen. Scroll down and find "Page Layouts" page block and click "Edit" action next to the main layout of the object. Click "Fields" and drag-drop a Section to an appropriate place in the layout.

  After dropping the "Section", you'll see the properties screen for the dropped "Section". Type in a section name and select if you want to display section header on detail page and edit page. Also select "1-column" for the layout. Then click "OK" button. You can customize these settings based on your layout needs.

  Now, go to Visualforce Pages from the top. Select the "Custom page name" you created (e.g. TestPage) and drag it into the section that you created previously. After dropping the page into the section, click the properties icon for the page on the top-right corner of the page in the section. Keep "Width (in pixels or %)" as "100%", set "Height (in pixels)" to "500". And check "Show scrollbars" option. Click OK button. We are done with the configuration. Save the layout by clicking the "Save" button on the left-top corner of the screen.

  Now if you go to your object's tab, you'll see the S-Drive Attachments inline in the page layout.

  Tip: You can use "Inline Visualforce Expander" tool from AppExchange to display S-Drive Attachments height dynamically. Refer to the "*S-Drive Advanced Configuration Guide*" page 31 for more information.

6. Allowing Customer Portal Users to Upload Case Files From Customer Portal

Go to "Setup" -> "App Setup" -> "Create" -> "Objects". Click "Edit" next to the "Case File" object. Scroll down to the "Optional Features" in "Edit" page. Check "Available for Customer Portal" and click "Save".

Go to "Setup" -> "Administration Setup" -> "Manage Users" -> "Profiles" and click "Edit" next to your currently installed "Customer Portal Manager" installation. Note that selected profile must be a cloned profile to make changes on it.

Scroll to the "Custom Object Permissions" section. Give Read, Create, Edit and Delete access to the "Case Files" custom object by checking the appropriate checkboxes, then click "Save".

(Optional) To Remove Submit & Add Attachments button from new case creation screen, look at the "*S-Drive Advanced Configuration Guide*" (page 33).

7. S-Drive Configuration

Organization administrators can use S-Drive Configuration to set organization-wide configurations and get information about S-Drive credentials, usage and billing. Using S-Drive Configuration, it is possible to:
- Enable/Disable Download Manager
- Enable/Disable Checksum Verification
- Enable/Disable Copy URL and Email features in S-Drive Tab
- Embed Thread Id In Case Emails
- Specify Restricted Portal User Profiles
- Specify Case Email Reply-To Address
- Specify Custom Email Footer
- Specify Max File Size in MBs
- Specify Default Email Expiration Time
- Change Default Upload Manager
- Allow users with "Modify All" permissions to create items at the top level and disallow other users
- Change field display settings of S-Drive Attachment objects
- Configure Attachment Sync.
- Update Amazon Information

You can refer to "*S-Drive Advanced Configuration Guide*" (page 35) for detailed information.

8. Attachment Sync

You can configure Salesforce Attachments to be synced with S-Drive Attachments. Once you add an attachment to any configured object, attachment will be synced to S-Drive Attachments.

You can refer to "*S-Drive Advanced Configuration Guide*" (page 42) for detailed information.

9. S-Drive Reports

Since version 1.17, you can create "File Activity" reports for the S-Drive files. For Accounts, Cases, Contacts, Opportunities and S3Objects reports are enabled by default. For other standard/custom object files you need to create a lookup relationship under File Activity object:

- Go to "Setup" -> "App Setup" -> "Create" -> "Objects" and click the "File Activity" object name. Scroll to the "Custom Fields & Relationships" for the object and click "New" button. Choose the field type" screen, select "Lookup Relationship" and click "Next" button.
- Choose the related object screen, select "Related To" from the drop-down as your object file (e.g. My Example Object File) and click "Next" button. Keep default values for other steps and click "Save" button.

S-Drive Reports tracks following activities:
- S-Drive OneClick Download
- S-Drive CopyUrl Download

- S-Drive DownloadManager Download Started
- S-Drive DownloadManager Download Completed
- S-Drive Email Sent.

To create S-Drive Reports, follow these steps:
- Click "Reports" tab and then click "New Report..." button.
- Select "Other Types" from "Select Report Type" screen and find the correct File Activity for your object (e.g. 'File Activities with Account File' for 'Accounts') and click "Create" button.
- "Activity Type" and "Additional Details" fields are important for S-Drive Reports. Arrange fields for report and run/save report based on your needs.

For more information about S-Drive Reports, refer to "*S-Drive Advanced Configuration Guide*" (page 43).

10. Sharing Rules and Permissions

S-Drive Attachments support all sharing rules similar to related objects. With version 1.24, S-Drive Folders supports manual sharing and it is also sharing-aware.

For more information about Sharing Rules, refer to "*S-Drive Advanced Configuration Guide*" (page 47).

You can apply object based sharing via manual sharing. Profile based permissions are also supported on custom object files. S-Drive supports four different access levels:

- *None*
- *Read*
- *Read + Create + Edit*
- *Read + Create + Edit + Delete*

To set these profiles based on permissions go to "Setup" -> "Administration Setup" -> "Manage Users" -> "Profiles" menu. Click on the "Edit" link next to the name of the profile you want to edit. Note that you cannot change the standard profiles' permissions. You may need to clone them before you can edit. Inside the "Edit" screen of the selected profile, scroll down to the "Custom Object Permissions" section. You'll see the "Basic Access" selections for your custom object files. You will need to check/uncheck these boxes based on your needs.

For more information and examples about S-Drive Permissions refer to "*S-Drive Advanced Configuration Guide*" (page 47).

11. S-Drive Support

You can contact S-Drive Support team for any questions or problems that you couldn't solve using S-Drive documents:
1. Open a Ticket at Support Site: sdriveapp.com/support
2. Email: sdrive@sdriveapp.com

You can find up-to-date product information, documents, tutorial videos, tools in our web page:
www.sdriveapp.com